

## Company Name

Company

Address Date

of Plan

Adoption

*Replace all grayed-out example text with text that fits within the section based on your business.*

## Mission and Objectives

Company Mission Statement

*This is a formal statement describing what your business plans to achieve. An example of a good mission statement is: We provide customers with cutting-edge digital marketing solutions with best-in-class technical support at a profit to our shareholders.*

## Sales Objectives

The sales objectives outlined below are goals supporting the company's growth a year from now, as well as years in the future, in terms of increasing revenue, market share, or profit margin.

*Enter your immediate sales objectives. Objectives should be specific, measurable, achievable, relevant, and timed. This is also known as being SMART.*

## 1-Year Sales Objectives

	Objective	How Objective Will Be Measured	Audit Frequency
1	<i>Example: Grow top-line sales revenue by 15% within one year of plan adoption.</i>	<i>Example: Year-to-date comparison against previous year's Sales Report</i>	<i>Example: Monthly</i>
2			
3			

**Ask yourself:** What do you want your business to look like at the end of three years? Enter sales objectives that are more challenging than your Year 1 objectives, but are also realistic for your business. Objectives should be specific, measurable, achievable, relevant, and timed.

3-Year Sales Objectives			
	Objective	How Objective Will Be Measured	Audit Frequency
1	<i>Example: Expand sales presence into Canada and Mexico within three years of plan adoption.</i>	<i>Example: Customer map</i>	<i>Example: Yearly</i>
2			
3			

**Ask yourself:** What do you want your business to look like at the end of five years? Enter sales objectives that are more challenging than your Year 3 objectives, but are also realistic for your business. Objectives should be specific, measurable, achievable, relevant, and timed.

5-Year Sales Objectives			
	Objective	How Objective Will Be Measured	Audit Frequency
1	<i>Example: Achieve more than \$100M in top-line revenue within five years of plan adoption</i>	<i>Example: Sales Report</i>	<i>Example: Yearly</i>
2			
3			

## Ideal Customer Profile

These are the demographics, buying patterns or credit worthiness, and sales territory of the ideal customer. This profile will be used to better identify prospects and prioritize future sales efforts.

*Delete this table if you are using a B2C sales model. Otherwise, fill in the table with the relevant job titles you will be targeting in your sales efforts. Describe the key responsibilities a person with this title might have, where you might network with them, and what channels you will use to identify them.*

Ideal Customer Profile: B2B Sales	
Relevant Job Titles	
Key Responsibilities	
Memberships and Clubs	<i>Example: Chamber of Commerce</i>
Available Sales Channels	<i>Example: Phone, Email, LinkedIn, Twitter</i>

Delete this table if you are using a B2B sales model. Otherwise, describe the demographics of your ideal customer as well as where you expect to find him or her.

<b>Ideal Customer Profile: B2C Sales</b>	
Gender	
Age	
Family Life	
Homeowner	
Income	
Education	
Interests	
Available Sales Channels	<i>Example: Phone, Email, LinkedIn, Twitter</i>

Delete this table if you are using a B2C sales model. Otherwise, fill in the table below describing the ideal organization of the person you identified in your ideal customer profile.

<b>Ideal Customer Organization Profile: B2B Sales</b>	
Company Size by Annual Revenue	
Company Size by Number of Employees	
Relevant Industries	<i>Example: Phone, Email, LinkedIn, Twitter</i>

Describe the geographic area or specific accounts where you intend to conduct sales-related activities. List any exceptions.

<b>Sales Territory</b>	
Geographic Location or Named Accounts	<i>Example: New England States</i>
Exceptions	<i>Example: Rhode Island</i>

## Strategies & Tactics

These are the longer-term strategies and day-to-day tactics that will be used to acquire new business opportunities as well as growing business with existing customers.

*List the strategies that will be used to accomplish your sales objectives with regards to gaining new customers. Identify at least two tasks that will be performed by members of the sales team on a daily or weekly basis in support of each strategy.*

New Business Acquisition	
Strategy	Supporting Tactics
<i>Example: Exceeds Sales Quota</i>	<i>Example: Send no less than xx letters of introduction to new prospects each week</i>



List the strategies that will be used to accomplish your sales objectives with regards to growing revenue with existing customers or customer accounts. Identify at least two tasks that will be performed by members of the sales team on a daily or weekly basis in support of each strategy.

Existing Business Growth	
Strategy	Supporting Tactics
<i>Example: Create a touch point program</i>	<i>Example: Contact each of my existing customers no less than once per month with a new idea they cannot get from anyone else</i>

## Sales Tools & Systems

The following systems will be used ensure the sales process is managed and sales activities are performed using approved tools. Progress reports will be used to measure the plan's success per the defined schedule.

*Progress reports are the tools you intend to use to track company and individual performance. Fill in the table below with the reports you plan to use. Describe how the report will be generated and where it will be stored. Include how often the report will be used to review progress.*

<b>Progress Reports</b>	<b>Where to Find the Report</b>	<b>Review Schedule</b>
<i>Example: Pipeline Report</i>	<i>Example: Pipedrive Pipeline Report</i>	<i>Example: By the 10th business day of each month</i>
<i>Example: Sales Report</i>		

Fill out the table below with the tools you or your sales team will be using to manage for contacts and communication.

<b>Communication and Contact Management</b>	<b>Tool and Description of Intended Use</b>
Contact Management	<i>Example: Pipedrive CRM</i>
Phone	<i>Example: Salespeople will be able to use their preferred device for calls that will be logged with Pipedrive's mobile app</i>
Email	<i>Example: Salespeople will be able to use either Gmail or Pipedrive's CRM email service</i>
Other	<i>Example: Instant Messaging Service</i>

While your sales plan does not have to include a full-featured CRM, contact management software helps to streamline the sales process by keeping relevant information about contacts such as title, relationship details, and call notes in a single place. Pipedrive CRM does all that as well as pipeline management. Visit [Pipedrive](#) for more details.

## Sales Pipeline

The health of the sales pipeline and success of the overall plan will be measured using the following metrics.

*Give each stage in your sales process a name. Define what milestone or tollgate must be completed in order to achieve the next stage in your process. List the reasons an opportunity may not reach the milestone or tollgate for each step in the sales process.*

Progress Reports		
Pipeline Stage Name	Pipeline Stage Activities	Reasons an Opportunity Might Be Lost or Abandoned
<i>Example: Cold Call</i>	<i>Example: Answered Phone Call</i>	<i>Example: Disconnected phone number</i>
<i>Example: Warm Lead</i>	<i>Example: Capability brochure sent</i>	<i>Example: Prospect refuses additional information</i>

Define what you would consider a successful conversion metric based on your business. You can read more about the definitions of conversion rates in our [article on sales metrics](#).

Conversion Rates	Value Considered Successful
Calls to Marketing Qualified Lead	<i>Example: One out of every eight calls</i>
Marketing Lead to Sales Qualified Lead	<i>Example: One out of every three presentations</i>
Sales Qualified Lead to Booked Order (win %)	<i>Example: One out of every five proposals sent</i>

Define the maximum length of time each step should take in order to still be considered successful, or net a positive return on overhead investment, for your business.

Average Length of Time in Sales Cycle	Value Considered Successful
Time to Qualify Marketing Lead	<i>Example: 48 hours</i>
Time to Qualify Sales Lead	<i>Example: One week</i>
Time to Book Order	<i>Example: One month</i>

A CRM system like [Pipedrive](#) allows most aspects of the sales plan's metrics to be measured and managed in real-time.

[Visit Pipedrive](#)

## Roles and Responsibilities

This section outlines the responsibilities of people who have a role in the success of the overall sales plan, including any separate marketing and/or marketing agency support.

Fill out the table below, including the summary of each role's responsibilities, the members of your team assigned to each role, and the KPIs they will be assessed on. KPIs are the key performance indicators, or numbers that will be used to measure the success of individual contributors within a team.

Role	Summary of Responsibilities	Team Members	KPI
<i>Example:</i> Account Manager	<i>Example:</i> Sets customer strategy		<i>Example:</i> Existing account revenue growth
<i>Example:</i> Sales Coordinator	<i>Example:</i> Issues quotations on behalf of account manager		<i>Example:</i> Time from when a quote is requested to when it is sent
<i>Example:</i> Telemarketer	<i>Example:</i> Lead acquisition campaigns		<i>Example:</i> Number of calls made
<i>Example:</i> Marketing	<i>Example:</i> Website enablement and sales collateral development		<i>Example:</i> Number of leads resulting for online sources

## Budget

In order to execute this sales plan, the following costs are expected:

*Several items have been itemized below as examples to help you get started. Add additional budget items for expenses that will be incurred in support of your plan. Enter how much you expect to spend for each expense in the first year of your plan's adoption under the column titled "Estimated Value." This section of your plan should be revisited each year and updated with the next year's estimates.*

Expense	Estimated Value
<i>Example: Salaries</i>	
<i>Example: Commissions</i>	
<i>Example: Travel</i>	
<i>Example: Telephone</i>	
<i>Example: CRM</i>	
<i>Example: Subscription Costs</i>	